

Integrated Disbursement and Information System (IDIS) OnLine Quick Tips User Guide

**U.S. Department of Housing and Urban Development (HUD)
Office of Community Planning and Development (CPD)**



September 15, 2009
Version 1.0

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1 Introduction

The Integrated Disbursement and Information System (IDIS) OnLine system is sponsored by the Office of Community Planning and Development (CPD) within the Department of Housing and Urban Development (HUD). IDIS OnLine is a real-time, web-based computer application that provides financial disbursement, tracking, and reporting activities for the CPD formula grant programs. IDIS OnLine enables HUD grantees to drawdown program funds and report on the activities and accomplishments outlined in each jurisdiction's Consolidated Plan. IDIS OnLine provides timely performance information regarding accomplishments achieved with the use of program funds, pursuant to the Government Performance and Results Act of 1993 (GPRA) and the specific requirements of the formula programs administered by CPD. IDIS OnLine programs include the Community Development Block Grant (CDBG) Program, HOME Investment Partnership Program (HOME), Emergency Shelter Grants (ESG), and Housing Opportunities for Persons with AIDS (HOPWA). IDIS OnLine also supports the American Recovery and Reinvestment Act (ARRA) grant programs Tax Credit Assistance Program (TCAP), CDBG Recovery (CDBG R), and Homelessness Prevention and Rapid Rehousing Program (HPRP). NOTE: HPRP grantees use IDIS OnLine for drawing funds only.

1.1 IDIS OnLine System Overview

IDIS OnLine is used by three different types of users:

- 1,100 CPD formula grant program participants located throughout the US
- HUD's 42 Field Offices (FOs)
- HUD Headquarters (HQ) staff

There are more than 14,000 active IDIS OnLine users.

IDIS OnLine Roles of Organization include the following:

Grantee – any organization receiving grant funds directly or indirectly from HUD to perform HUD-approved program work. A grantee is the “owner” of the program funds and is responsible for performance of the approved, CPD-funded projects and activities. All grantees are given a Unit of Government code and number (UOG CD and UOG NM) to identify them. Grantees can delegate some or all of their project activities to **subrecipients**, who are organizations that may or may not have access to IDIS OnLine. For example: in the HOME program, CHDOs do not have access to IDIS OnLine. Grantees can delegate some or all of their project activities to **subgrantees**, who receive funds for this work and who update these activities using IDIS OnLine. The HOME program has special rules and regulations for state subgrantees regarding usage of grant funds.

Other Entity is a special subgrantee organization receiving a subgrant and is identified as an Other Entity on the system.

Community Housing Development Organization (CHDO) is a special type of grantee that receives a set-aside subgrant.

CPD's formula grants management process includes the following seven steps:

CPD 7-Step Grants Management Process

Step	Grants Management Process Description
Step 1	Develop and gain approval of 3 to 5 year Consolidated Plan that serves as: <ul style="list-style-type: none">• A planning document for the jurisdiction• A single application for federal funds under HUD's formula grant programs• A strategy to be followed in carrying out HUD's performance government• An action plan that provides the basis for assessing performance
Step 2	Annually, create and gain approval of an Action Plan that describes the projects and assigns budget amounts for the upcoming plan year
Step 3	Receive Annual Funding under HUD formula grant programs and other sources
Step 4	Designate detailed Activities and related annual budgets under each project that can be measured to assess progress for the work being done
Step 5	Commit Funds for a given activity
Step 6	Drawdown and Disburse committed funds for an activity
Step 7	Report on program year accomplishments and performance

The role of IDIS OnLine in Grants Management is to begin supporting the grants management process after the planning stage. After a grantee signs a grant agreement with HUD, grant funds are then reported to IDIS OnLine and the grantee is ready to set up activities, drawdown funds, and report on the progress of each activity. IDIS OnLine supports the process through the transaction and performance reporting stage and feeds information into other CPD systems (Line of Credit Control System – LOCCS and Grants Management Process System – GMP).

1.2 IDIS OnLine User Technical Support Resources

If a user needs assistance while working on IDIS OnLine, there are several resources available. In addition to getting help from their local Field Office, they may also contact the following:

IDIS OnLine Quick Tips User Guide

Technical Assistance Unit (TAU) Hours of Operation:	Monday – Friday 8:15 a.m. - 7:00 p.m. (Eastern)
TAU Support Contact Information	
Toll Free Help Line	1-877-483-8282
Fax Number	1-703-553-8444
E-mail	Idis.help@hud.gov
IDIS ID/Password Resets	HUD National Help Desk Toll Free: 1-888-297-8689, Option 3
Additional information about IDIS OnLine	http://www.hud.gov/offices/cpd/systems/idis/index.cfm
IDIS OnLine login instructions	http://www.hud.gov/offices/cpd/systems/idis/idis.cfm

The IDIS OnLine Quick Tips User Guide serves to walk IDIS OnLine users step-by-step through the major IDIS OnLine system functionalities. The major functionalities covered in this guide include:

- Adding, Search/Edit, View, and Copy Projects
- Adding, Editing, and Funding Activities
- Creating and Approving Drawdowns/Vouchers
- Adding Receipts
- Search/Edit Receipts
- View Receipts
- View Receipt Accounts
- Adding Subfunds and Subgrants
- Editing a Grantee User Profile
- Editing Existing User Roles
- Viewing Existing User Roles

2 Logging into IDIS OnLine

- 1) Go to the **Log on to IDIS** web page:

<http://www.hud.gov/offices/cpd/systems/idis/idis.cfm>

- 2) Click the word **here** to get to the login screen.

The screenshot shows the HUD Community Planning & Development website. The left sidebar contains navigation links for 'Homes & Communities', 'Community Planning and Development', 'Online Systems/Databases', 'IDIS', 'HUD news', 'Homes', 'Resources', 'Communities', 'Working with HUD', and 'Tools'. The main content area is titled 'Community Planning & Development' and 'Log on to IDIS'. It features a 'What's New' section with links to 'IDIS Online Data Download Documentation', 'How to Run Reports in IDIS Online', and '2009 Formula Grant Allocations'. Below this, it says 'To log on to IDIS OnLine, click **here**.' and provides contact information for the IDIS helpdesk. There are also sections for 'Security Issues', 'Helpful Numbers', and 'Related Information'.

- 3) **IDIS Login** page will appear (<https://www21.hud.gov/idis>)

- 4) Enter **Username** and **Password**

- I. Grantee users will use their C# as their Username. Their temporary password is the first initial capitalized and the last name with first letter capitalized. For example, if your name is ABRAHAM LINCOLN your temporary password will be ALincoln. They will be prompted to change their password immediately upon login. The new password must contain the following:

- At least 8 characters
- At least one capitalized letter
- At least one lower case letter
- At least one number
- At least one special character (any symbol, such as \$*!@&)

- II. HUD staff will use their regular H# as their Username with their regular network password

- 5) Next, click the **Login** button

The screenshot shows the IDIS Login page. On the left is a red sidebar with the 'Homes & Communities' logo and a list of links under 'Community Planning and Development', including 'Log on to IDIS', 'Getting Started', 'Training', 'Reporting and Guidance', and 'Library'. The main content area has a red header with 'Community Planning & Development' and a white box titled 'IDIS Login'. Inside this box, it says 'Please enter your Username (C***** or H*****) and Password to log in.' There are input fields for 'Username:' and 'Password:', followed by a 'Login' button. At the bottom of the page, there is a footer with links for 'FOIA', 'Privacy', 'Web Policies and Important Links', and 'Home', along with the HUD seal and contact information for the U.S. Department of Housing and Urban Development.

- 6) **IDIS Disclaimer** page will appear
- 7) Read disclaimer statement and click **I accept** button if you agree to the disclaimer.
- 8) If you have multiple profiles, the **Profile Selection** page will be displayed with all of your available profiles listed. Select your appropriate profile, next click **Select Profile** button

IDIS OnLine Quick Tips User Guide

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

Utilities
- [Print Page](#)
- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Disclaimer
[Review Data Collection Policy](#)

You are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of this system is prohibited and subject to criminal and civil penalties. Use of this system indicates consent to monitoring and recording.

|

Home icon

9) Welcome to the Integrated Disbursement and Information System page will appear

10) Congratulations - you are now in IDIS OnLine!

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Grantee
Organization: BOSTON
[Logout](#)

Utilities
- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Projects/Activities **Funding/Drawdown** **Grant** **Grantee/PJ** **Admin** **Reports**

Welcome to the Integrated Disbursement and Information System

IDIS News
No news to display.

Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers.

Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session.

To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page.

Content updated Nov 14, 2008

U.S. Department of Housing and Urban Development
451 7th Street S.W., Washington, DC 20410
Telephone: (202) 708-1112 TTY: (202) 708-1455

Home icon

NOTE: CPD posts important news items about IDIS OnLine in the NEWS section. News may related to system outages, reports, tips, known errors, holiday hours, etc. ***Please take a moment to read the NEWS each time you login; it may answer many of your questions!***

3. Projects

3.1 Add Projects

- 1) Click the **Projects/Activities** tab at top of screen

The screenshot displays the IDIS OnLine web application interface. At the top, a header bar contains the text 'U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT' and 'IDIS version 11.0.1_3381'. Below this is a blue banner with 'Community Development Systems' and 'Integrated Disbursement & Information System (IDIS)'. A navigation bar features several tabs: 'Projects/Activities' (which is highlighted), 'Funding/Drawdown', 'Grant', 'Grantee/PJ', 'Admin', and 'Reports'. On the left side, there is a sidebar with user information: 'User ID: C01133', 'User Role: Grantee', 'Organization: MILWAUKEE', and a '- Logout' link. Below this are sections for 'Utilities' (with links to Home, Data Downloads, Print Page, and Help) and 'Links' (with links to PDF Viewer, Support, CPD Home, and HUD Home). The main content area has a 'Welcome to the Integrated Disbursement and Information System' message. Below the welcome message is an 'IDIS News' section stating 'No news to display.' To the right of the news section are two warning boxes. The first warning states: 'Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers.' The second warning states: 'Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session.' Below the warnings, there is a note: 'To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page.' At the bottom of the main content area, it says 'Content updated Nov 14, 2008'. The footer of the page includes the U.S. Department of Housing and Urban Development address: '451 7th Street S.W., Washington, DC 20410' and telephone numbers: 'Telephone: (202) 708-1112 TTY: (202) 708-1455'. A small house icon is visible in the bottom right corner of the page.

- 2) Click the **Add** link on left side under **Project**
- 3) Enter in required data of **Program Year** and **Project Title**
- 4) Enter in additional information as needed, including **Add New Program Year**, **Grantee/PJ Project ID**, and/or **Description**
- 5) Click the **Save** button

Organization: MILWAUKEE - Logout	Project Add Project
Activity - Add - Search	<input type="button" value="Save"/> <input type="button" value="Reset"/>
Project - Add - Search - Copy	<p>* Indicates Required Field</p> <p>Grantee/PJ Name: MILWAUKEE</p> <p>Program Year *Program Year: <input type="text"/> <input type="checkbox"/> Add New Program Year: (ex: yyyy)</p>
Utilities - Home - Data Downloads - Print Page - Help	<p>IDIS Project ID:</p> <p>*Project Title:</p> <p>Grantee/PJ Project ID:</p> <p>Description:</p> <p>Allow Another Organization to Set up Activities under this Project: (tip)</p> <p><input type="button" value="Select Organization"/></p>
Links - PDF Viewer - Support - CPD Home - HUD Home	

3.2 Search/Edit Projects

- 1) Click the **Projects/Activities** tab at top of screen

The screenshot displays the IDIS OnLine web application interface. At the top, a dark blue header bar contains the text "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" on the left and "IDIS version 11.0.1_3381" on the right. Below this, a lighter blue banner reads "Community Development Systems Integrated Disbursement & Information System (IDIS)" with a large "CDS" logo on the right. A navigation bar below the banner features several tabs: "Projects/Activities" (which is highlighted), "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports".

On the left side of the main content area, there is a sidebar with user information and navigation links. The user information section shows "User ID: C01133", "User Role: Grantee", and "Organization: MILWAUKEE", with a "Logout" link below. The "Utilities" section lists links for "Home", "Data Downloads", "Print Page", and "Help". The "Links" section lists links for "PDF Viewer", "Support", "CPD Home", and "HUD Home".

The main content area has a yellow background and features a "Welcome to the Integrated Disbursement and Information System" message. Below this, there is an "IDIS News" section with the text "No news to display." To the right of the news section, there are two warning messages. The first warning states: "Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers." The second warning states: "Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session." Below these warnings, there is a note: "To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page." At the bottom of the main content area, it says "Content updated Nov 14, 2008" and provides contact information for the U.S. Department of Housing and Urban Development: "451 7th Street S.W., Washington, DC 20410" and "Telephone: (202) 708-1112 TTY: (202) 708-1455". A small home icon is visible in the bottom right corner of the page.

- 2) Enter applicable **Search Criteria**, including **Program Year**, **Program**, **Project Title**, **IDIS Project ID**, **Grantee/PJ Project ID**, and/or **Status**
- 3) Click the **Search** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

IDIS version 11.0.1_3381

Community Development Systems

Integrated Disbursement & Information System (IDIS)

User ID: C01133
User Role: Grantee
Organization:
MILWAUKEE
[Logout](#)

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

Reports

Project

Search Projects

Search Criteria

Program Year:

Program:

Project Title:

IDIS Project ID:

Grantee/PJ Project ID:

Status:

Search

Reset

Activity

[Add](#)
[Search](#)

Project

[Add](#)
[Search](#)
[Copy](#)

Utilities

[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links

[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

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- 4) Search Results Page will appear
- 5) Click **Edit** under **Action** column to make any changes to the Project information

User ID: C01133
User Role: Grantee
Organization:
MILWAUKEE

[Logout](#)

Projects/Activities

Project

Search Projects

Search Criteria

Program Year:
2008

IDIS Project ID:
14

Program:

Grantee/PJ Project ID:

Project Title:

Status:
Select

Results Page 1 of 1

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action
2008	14		testing	MILWAUKEE, WI	Open	Edit View

Activity

[Add](#)
[Search](#)

Project

[Add](#)
[Search](#)
[Copy](#)

Utilities

[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links

[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

- 6) User may now edit **Project Title**, **Grantee/PJ Project ID**, and/or **Description**
- 7) After making edits to project click the **Save** button

Organization: MILWAUKEE - Logout	Project Edit Project
Activity - Add - Search	Save Return To Projects View History View Activities Cancel Project
Project - Add - Search - Copy	*Indicates Required Field Grantee/PJ Name: MILWAUKEE Program Year: 2008 IDIS Project ID: 14 Status: Open *Project Title: <input type="text" value="testing"/> Grantee/PJ Project ID: <input type="text"/> Description: <input type="text"/> Allow Another Organization to Set up Activities under this Project: (tip) <input type="button" value="Select Organization"/>
Utilities - Home - Data Downloads - Print Page - Help	
Links - PDF Viewer - Support - CPD Home - HUD Home	

3.3 View Projects

- 1) Click **Projects/Activities** tab at top of screen

The screenshot displays the IDIS OnLine web application interface. At the top, a header bar contains the text "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" on the left and "IDIS version 11.0.1_3381" on the right. Below this is a blue banner with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)" in white text, accompanied by a "CDS" logo. A navigation menu below the banner includes tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". The "Projects/Activities" tab is currently selected. On the left side, a sidebar shows user information: "User ID: C01133", "User Role: Grantee", "Organization: MILWAUKEE", and a "Logout" link. Below this are sections for "Utilities" (Home, Data Downloads, Print Page, Help) and "Links" (PDF Viewer, Support, CPD Home, HUD Home). The main content area features a "Welcome to the Integrated Disbursement and Information System" message. Below this is an "IDIS News" section stating "No news to display." To the right of the news section are two "Warning!" messages: one about misuse of federal information and another about session timeout. At the bottom right, there is contact information for the U.S. Department of Housing and Urban Development, including the address "451 7th Street S.W., Washington, DC 20410" and phone numbers "(202) 708-1112" and "(202) 708-1455". A small home icon is visible in the bottom right corner of the interface.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C01133
User Role: Grantee
Organization: MILWAUKEE
- [Logout](#)

Projects/Activities Funding/Drawdown Grant Grantee/PJ Admin Reports

**Welcome to the
Integrated Disbursement and Information System**

Utilities
- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

IDIS News
No news to display.

Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers.

Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session.

To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a **new** window using the link on the IDIS Reports page.

Content updated Nov 14, 2008

U.S. Department of Housing and Urban Development
451 7th Street S.W., Washington, DC 20410
Telephone: (202) 708-1112 TTY: (202) 708-1455

- 2) Enter applicable **Search Criteria**, including **Program Year**, **Program**, **Project Title**, **IDIS Project ID**, **Grantee/PJ Project ID**, and/or **Status**
- 3) Click the **Search** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

IDIS version 11.0.1_3381

Community Development Systems

Integrated Disbursement & Information System (IDIS)

User ID: C01133
User Role: Grantee
Organization:
MILWAUKEE
[Logout](#)

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

Reports

Project

Search Projects

Search Criteria

Program Year:

Program:

Project Title:

IDIS Project ID:

Grantee/PJ Project ID:

Status:

Search | Reset

Activity

[Add](#)
[Search](#)

Project

[Add](#)
[Search](#)
[Copy](#)

Utilities

[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links

[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

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- 4) Search Results Page will appear
- 5) Click the **View** link under **Action** column of applicable project

User ID: C01133
User Role: Grantee
Organization:
MILWAUKEE
[Logout](#)

Activity
[Add](#)
[Search](#)

Project
[Add](#)
[Search](#)
[Copy](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Projects/ActivitiesFunding/DrawdownGrantGrantee/PJAdminReports

Project

Search Projects

Search Criteria

Program Year:
2008

Program:

Project Title:

IDIS Project ID:
14

Grantee/PJ Project ID:

Status:
Select

SearchReset

Results Page 1 of 1

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action
2008	14		testing	MILWAUKEE, WI	Open	Edit View

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6) View Project page will appear

- Logout	View Project						
Activity - Add - Search	<input type="button" value="Return To Projects"/>						
Project - Add - Search - Copy	Grantee/PJ Name: MILWAUKEE Program Year: 2008 IDIS Project ID: 14						
Utilities - Home - Data Downloads - Print Page - Help	Status: Open Project Title: testing Grantee/PJ Project ID:						
Links - PDF Viewer - Support - CPD Home - HUD Home	Description: <div style="border: 1px solid black; height: 20px; width: 100%;"></div>						
<p>Allow Another Organization to Set up Activities under this Project:</p>							
<p>Estimated Amount (Including Program Income)</p> <table border="1"> <tr> <td>CDBG</td> <td>\$500,000.00</td> </tr> <tr> <td>HOME</td> <td>\$0.00</td> </tr> <tr> <td>ESG</td> <td>\$0.00</td> </tr> </table>		CDBG	\$500,000.00	HOME	\$0.00	ESG	\$0.00
CDBG	\$500,000.00						
HOME	\$0.00						
ESG	\$0.00						

3.4 Copy Projects

1) Click **Projects/Activities** tab at top of screen

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT		IDIS version 11.0.1_3381	
Community Development Systems			
Integrated Disbursement & Information System (IDIS)			
User ID: C01133 User Role: Grantee Organization: MILWAUKEE - Logout	Projects/Activities	Funding/Drawdown	Grant
	Grantee/PJ	Admin	Reports
<p>Welcome to the Integrated Disbursement and Information System</p>			
Utilities - Home - Data Downloads - Print Page - Help	IDIS News No news to display.		<p>Warning! Misuse of Federal Information at this Web site falls under the provisions of Title 18, United States Code, section 1030. This law specifies penalties for exceeding authorized access, alteration, damage, or destruction of information residing on Federal computers.</p> <p>Warning! Your IDIS working session will time out after 20 minutes if there is no interaction with the application server. The system will provide a warning and prompt you if you need more time 3 minutes prior to the expiration of the current session.</p> <p>To work with IDIS MicroStrategy Reports, you must first close any remaining MicroStrategy windows from prior sessions, and open a new window using the link on the IDIS Reports page.</p> <p>Content updated Nov 14, 2008</p> <p>U.S. Department of Housing and Urban Development 451 7th Street S.W., Washington, DC 20410 Telephone: (202) 708-1112 TTY: (202) 708-1455</p>
Links - PDF Viewer - Support - CPD Home - HUD Home			

- 2) Next, click the **Copy** link on left side under **Project**

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

Community Development Systems

Integrated Disbursement & Information System (IDIS)

IDIS version 11.0.1_3381

User ID: C01133

User Role: Grantee

Organization: MILWAUKEE

- [Logout](#)

Activity

- [Add](#)

- [Search](#)

Project

- [Add](#)

- [Search](#)

- [Copy](#)

Utilities

- [Home](#)

- [Data Downloads](#)

- [Print Page](#)

- [Help](#)

Links

- [PDF Viewer](#)

- [Support](#)

- [CPD Home](#)

- [HUD Home](#)

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

Reports

Project

Search Projects

Search Criteria

Program Year:

Program:

Project Title:

IDIS Project ID:

Grantee/PJ Project ID:

Status:
Select

|

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- 3) The **Copy Project** page will appear
- 4) Select **Program Year** in dropdown menu of the **Copy Project to Program Year** field
- 5) In the **Copy** column of the **Results Page**, place a check by the project(s) you wish to copy
- 6) If user would like to **Copy Project to New Program Year**, click the applicable box and type in year within the **Program Year** section
- 7) Click the **Copy Projects** button

[- Logout](#)

Activity
[- Add](#)
[- Search](#)

Project
[- Add](#)
[- Search](#)
[- Copy](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Copy Project

Copy Projects

***Indicates Required Field**

Search Criteria
Program Year:
2008

Program:

Project Title:

IDIS Project ID:
(ек: nnnn)

Grantee/PJ Project ID:
(ек: x-nnnn-xxxx)

Search | Reset

Program Year
***Copy Project to Program Year:** ☐ **Copy Project to New Program Year:** ☐

(ек: yyyy)

Results Page 1 of 77

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	*Copy
2008	1		NRSA AREA #1	<input type="checkbox"/>
2008	2		NRSA AREA #2	<input type="checkbox"/>
	3		NRSA AREA #3 - PROJECT #3 IS NOT USED IN 2008	<input type="checkbox"/>

8) Project(s) Copied page will appear

[- Logout](#)

Activity
[- Add](#)
[- Search](#)

Project
[- Add](#)
[- Search](#)
[- Copy](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Copy Project

- Project(s) copied.

Copy Projects

***Indicates Required Field**

Search Criteria
Program Year:

▼

Program:

▼

Project Title:

IDIS Project ID:

(ex: 0000)

Grantee/PJ Project ID:

(ex: K-0000-K000)

|

Program Year
***Copy Project to Program Year:** ☐ **Copy Project to New Program Year:** ☐

▼

(ex: yyyy)

Results Page 1 of 54

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	*Copy
2009	1		FAIR HOUSING (BOSTON FAIR HOUSING COMMISSION)	<input type="checkbox"/>
----	2		RESERVED	<input type="checkbox"/>

4. Activities

4.1 Adding Activities

- 1) Select **Projects/Activities** Tab at top of screen

The screenshot displays the IDIS OnLine web application interface. At the top, a header bar contains the text "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this, a blue banner reads "Community Development Systems Integrated Disbursement & Information System (IDIS)" with the "CDS" logo on the right. A navigation menu below the banner includes tabs: "Projects/Activities" (selected), "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports".

On the left side, a user information box shows: "User ID: C01133", "User Role: Grantee", "Organization: MILWAUKEE", and a "Logout" link. Below this are two boxes: "Utilities" with links for Home, Data Downloads, Print Page, and Help; and "Links" with links for PDF Viewer, Support, CPD Home, and HUD Home.

The main content area features a "Welcome to the Integrated Disbursement and Information System" message. Below this is an "IDIS News" section stating "No news to display." To the right of the news section are two warning messages: one about misuse of federal information and another about session expiration. Below the warnings, there is a note about working with IDIS MicroStrategy Reports. At the bottom of the main area, it says "Content updated Nov 14, 2008" and provides contact information for the U.S. Department of Housing and Urban Development.

At the bottom right of the page, there is a small home icon.

- 2) Click the **Add** link on left side under **Activity**
- 3) Enter required data: **Activity Owner**, **Activity Name**, **Program Year**, **IDIS Project ID/Project Title**, **Activity Category** and **Environmental Assessment**
- 4) Enter other additional information as needed
- 5) Click **Save**

Activity

- [Add](#)
- [Search](#)

Project

- [Add](#)
- [Search](#)
- [Copy](#)

Utilities

- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links

- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Save
Cancel

***Indicates Required Field**

***Activity Owner:**
MILWAUKEE, WI

***Program Year:**
Select

***IDIS Project ID/Project Title:**
Select

***Activity Name:**

Grantee/PJ Activity ID:

Activity	Program	*Activity Category	Ready to Fund	Setup Detail
	CDBG	None	No	Add CDBG
	ESG	None	No	Add ESG
	HOME	None	No	Add HOME
	HOPWA	None	No	Add HOPWA

***Environmental Assessment:**

☐ Underway
☐ Exempt
☐ Complete

Allow Another Organization to Access this Activity: (tip)

[Select Organization](#)

Activity Description:

- 6) **The new activity has been saved** message will appear
- 7) To continue setup of the activity, click the applicable program to add under the **Setup Detail** column.

MILWAUKEE
[Logout](#)

Activity
[Add](#)
[Search](#)

Project
[Add](#)
[Search](#)
[Copy](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[PD Home](#)
[HUD Home](#)

Edit Activity

- The new activity has been saved.

|

***Indicates Required Field**

Activity Owner:
MILWAUKEE, WI

Activity Status:
Open

IDIS Activity ID:
8886

Completion Date:
 [Select Date](#)
(ex: mm/dd/yyyy)

***Program Year:**
2008

Grantee/PJ Activity ID:

***IDIS Project ID/Project Title:**
14/testing (2008)

Initial Funding Date:

***Activity Name:**
testing activity

Activity					
Program	*Activity Category (tip)	Ready to Fund	Funded	Setup Detail	Accomplishment
CDBG	05 - Public Services (General)	No	No	<input type="button" value="Add CDBG"/>	<input type="button" value="Add CDBG Accomplishment"/>
ESG	None	No	No	<input type="button" value="Add ESG"/>	<input type="button" value="Add ESG Accomplishment"/>

4.2 Editing Activities

- 1) Click the **Projects/Activities** Tab at top of screen
- 2) Enter applicable **Search Criteria** for the activity
- 3) Click the **Search** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

IDIS version 11.0.1_3381

Community Development Systems

Integrated Disbursement & Information System (IDIS)

User ID: C15581

User Role: Grantee

Organization:

LOUISVILLE - JEFFERSON COUNTY METRO GOVT

- [Logout](#)

Activity

- [Add](#)

- [Search](#)

Project

- [Add](#)

- [Search](#)

- [Copy](#)

Utilities

- [Home](#)

- [Data Downloads](#)

- [Print Page](#)

- [Help](#)

Links

- [PDF Viewer](#)

- [Support](#)

- [CPD Home](#)

- [HUD Home](#)

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

Reports

Activity

Search Activities

Search Criteria

Program:

All

IDIS Project ID:

Status:

All

Activity Name:

IDIS Activity ID:

Program Year:

Select

Grantee/PJ Activity ID:

Activity Owner:

LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY

Search

Reset

Page 25

- 4) Search results will appear
- 5) Choose the applicable activity by clicking **Edit** under the **Action** column on the right side of page

Organization:
LOUISVILLE - JEFFERSON
COUNTY METRO GOVT

[- Logout](#)

Activity

[- Add](#)

[- Search](#)

Project

[- Add](#)

[- Search](#)

[- Copy](#)

Utilities

[- Home](#)

[- Data Downloads](#)

[- Print Page](#)

[- Help](#)

Links

[- PDF Viewer](#)

[- Support](#)

[- CPD Home](#)

[- HUD Home](#)

Activity

Search Activities

Search Criteria

Program: HOME **IDIS Project ID:** **Status:** All

Activity Name: **IDIS Activity ID:**

Program Year: Select **Grantee/PJ Activity ID:** **Activity Owner:** LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY

|

Results Page 1 of 281

Activity Name	Program Year/ Project ID	IDIS Activity ID	Grantee/PJ Activity ID	Status	Activity Owner	Action
TBRA -VARIOUS CLIENTS JULY'S RENT & LGE	2008/32	23798		Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
GRAHAM, PAULINE	2006/5	23790	HOME REPAIR	Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
COOPER, SHAQUILLA	2006/40	23774	DAP	Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
MINOR, ALMA	2006/40	23773		Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
HURRIGAN, RENITA	2006/40	23772	DAP	Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View
CALHOUN, WILBERT	2006/40	23771	NEWBURG-DAP	Open	LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY	Edit View

- 6) Make the necessary changes to the Activity, including **Activity Status**, **Completion Date**, **Program Year**, **IDIS Project ID/Project Title**, **Grantee/PJ Activity ID**, and/or **Activity Name**
- 7) Next click the **Save** button
- 8) If program edits are needed, click applicable program button under **Setup Detail** (**Edit HOME** button for example shown below)

Organization:
LOUISVILLE -
JEFFERSON
COUNTY METRO
GOVT

[Logout](#)

Activity
Edit Activity

Save | Cancel

Activity
[Add](#)
[Search](#)

Project
[Add](#)
[Search](#)
[Copy](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

***Indicates Required Field**

Activity Owner:
LOUISVILLE - JEFFERSON COUNTY METRO GOVT, KY

Activity Status:
Open

IDIS Activity ID:
23798

Completion Date:
 [Select Date](#)
(ex: mm/dd/yyyy)

***Program Year:**
2008

Grantee/PJ Activity ID:

***IDIS Project ID/Project Title:**
32/HOME - HOME TENANT BASED RENTAL ASSISTANCE PROGRAM (2008)

Initial Funding Date:
07/25/2008

***Activity Name:**
TBRA-VARIOUS CLIENTS JULY'S RENT &

Activity

Program	*Activity Category (tip)	Ready to Fund	Funded	Setup Detail	Accomplishment
CDBG	None	No	No	Add CDBG	Add CDBG Accomplishment
ESG	None	No	No	Add ESG	Add ESG Accomplishment
HOME	Tenant-Based Rental Assistance (TBRA)	No	No	Edit HOME	Add HOME Accomplishment
HOPWA	None	No	No	Add HOPWA	Add HOPWA Accomplishment

- 9) If program button under the **Setup Detail** column is selected from previous page, the program specific **Setup Detail** page will be displayed (**Edit HOME Setup Detail** is the example shown below)
- 10) Make the necessary edits to the Activity setup detail, including **Performance Objective**, **Will this activity be carried out by a faith-based organization** and/or **Performance Outcome**
- 11) In addition, user can also edit, add or delete required data at bottom of page
- 12) Then click the **Save** button

Organization:
LOUISVILLE -
JEFFERSON COUNTY
METRO GOVT

[Logout](#)

Activity
[Add](#)
[Search](#)

Project
[Add](#)
[Search](#)
[Copy](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help \(Add\)](#)
[Help \(Edit\)](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Activity
Edit HOME Setup Detail

Tenant-Based Rental Assistance (TBRA)

|

*** Indicates Required Field**

Grantee/PJ Activity ID: N/A	Activity Name: TBRA -VARIOUS CLIENTS JULY'S RENT & LGE	Program Year/Project ID: 2008/32
IDIS Activity ID: 23798	Activity Owner: LOUISVILLE - JEFFERSON COUNTY METRO GOVT	Project Title: HOME - HOME TENANT BASED RENTAL ASSISTANCE PROGRAM

***Performance Objective:**
Create suitable living environments

Will this activity be carried out by a faith-based organization?
☐ Yes ☒ No

***Performance Outcome:**
Availability/accessibility

Beneficiary Units Total: 1

Page 1 of 1

			Monthly Rent			Household					Tenant Contract			Action
Last Name	# of Bdms	Security Deposit	Tenant Rent	TBRA Subsidy	Total Rent	Percent Area Median Income	Hispanic/Latino	Race	Size	Type	Paid To	Newly Assisted	Months	
DANZY	3 bedrooms	\$0	\$0	\$177	\$177	30+ to 50%	No	White	3 persons	Single Parent	Owner	No	24	Edit Delete

4.3 Funding Activities

- 1) Select the **Funding/Drawdown** Tab
- 2) The **Activity Funding** page will appear
- 3) Enter applicable search criteria
- 4) Click the **Search** button

The screenshot displays the 'Activity Funding' page within the IDIS system. The header includes the U.S. Department of Housing and Urban Development logo and the text 'Community Development Systems Integrated Disbursement & Information System (IDIS)'. The version number 'IDIS version 11.0.1_3381' is visible in the top right corner. The left sidebar contains user information (User ID: C32177, User Role: Grantee, Organization: BOSTON) and a 'Logout' link. The main navigation tabs are 'Projects/Activities', 'Funding/Drawdown' (selected), 'Grant', and 'Grantee/PJ'. The 'Activity Funding' section is titled 'Search for Activities to Fund'. The search criteria form includes fields for 'Program' (dropdown), 'Activity Name' (text), 'Program Year' (dropdown), 'IDIS Project ID' (text), 'IDIS Activity ID' (text), 'Grantee/PJ Activity ID' (text), 'Activity Status' (dropdown), and '* Activity Owner' (dropdown). A 'Search' button and a 'Reset' button are located at the bottom of the search criteria form. The left sidebar also contains links for 'Activity Funding' (Search), 'Drawdown' (Create Voucher, Search Voucher, Approve Voucher), 'Receipt' (Add, Search, Search Accounts), and 'Utilities' (Home, Data Downloads, Print Page, Help).

- 5) The Search Results page will appear
- 6) Select **Add-Edit** under the Action column

User ID: C32177
User Role: Grantee
Organization: BOSTON

[Logout](#)

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)

Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ

Activity Funding

Search for Activities to Fund

Search Criteria

Program:

Activity Name:

Program Year:

IDIS Project ID:

IDIS Activity ID:

Grantee/PJ Activity ID:

Activity Status:

***Activity Owner:**

|

Results Page 1 of 1

Activity Name	Program Year/ IDIS Project ID	IDIS Activity ID	Grantee/PJ Activity ID	Activity Status	Activity Owner	Action
BELLA LUNA RESTAURANT	2008/17	14626		Open	BOSTON, MA	Add-Edit

- 7) The Edit Activity Funding page will appear
- 8) Select **Add-Edit-View** under the Action column for the appropriate activity

User ID: C32177
User Role: Grantee
Organization:
BOSTON

[Logout](#)

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Activity Funding

Edit Activity Funding

[Return to Search for Activities to Fund](#)

***Indicates Required Field**

Activity Owner:
BOSTON, MA

IDIS Activity ID:
14624

Activity Name:
26 WOODDALE AVENUE

Program Year/Project:
2008/3

Total Funded:
\$105,500.00

Total Drawn:
\$0.00

Funding Sources

Recipient Name:
All Recipients

Program:
All Programs

Fund Type:
All Fund Types

[Filter](#) | [Reset](#)

Available Funds

Recipient Name	Program	Fund Type	Source Name	Source Type	Available for Funding	Funded Amount	Drawn Amount	Action
BOSTON, MA	HOME	AD	HUD	MC	\$634,803.05	\$100,000.00	\$0.00	Add-Edit View

- 9) The **Add-Edit Funding Line Item** page will appear
- 10) Enter dollar amount in **Funded Amount** field, **Grant Year** field is optional
- 11) Click the **Save** button

Organization:
BOSTON
- [Logout](#)

Activity Funding
- [Search](#)

Drawdown
- [Create Voucher](#)
- [Search Voucher](#)
- [Approve Voucher](#)

Receipt
- [Add](#)
- [Search](#)
- [Search Accounts](#)

Utilities
- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Activity Funding

Add-Edit Funding Line Item

[Return to Add-Edit Funding](#)

Activity Owner:
BOSTON, MA

IDIS Activity ID:
14624

Activity Name:
26 WOODDALE AVENUE

Program Year/Project:
2008/3

Total Funded:
\$105,500.00

Total Drawn:
\$0.00

Program	Fund Type	Source Name	Source Type	Recipient Name	Available for Funding	Drawn Amount	Funded Amount
HOME	AD	HUD	MC	BOSTON, MA	\$634,803.05	\$0.00	\$100,000.00

Current Funding for This Source

Grant Year (up)	Funded Amount	Drawn Amount
2007	\$ 100,000.00	\$0.00

[Add Grant Year](#) | [Save](#) | [Cancel](#)

[Return to Add-Edit Funding](#)

12) Activity funded successfully message will appear

User ID: C32177 User Role: Grantee Organization: BOSTON - Logout	<table border="1"> <tr> <td>Projects/Activities</td> <td>Funding/Drawdown</td> <td>Grant</td> <td>Grantee/PJ</td> </tr> </table>	Projects/Activities	Funding/Drawdown	Grant	Grantee/PJ												
Projects/Activities	Funding/Drawdown	Grant	Grantee/PJ														
Activity Funding - Search	Activity Funding Add-Edit Funding Line Item <ul style="list-style-type: none"> • Activity funded successfully. 																
Drawdown - Create Voucher - Search Voucher - Approve Voucher	<input type="button" value="Return to Add-Edit Funding"/>																
Receipt - Add - Search - Search Accounts	Activity Owner: BOSTON, MA Program Year/Project: 2008/3 IDIS Activity ID: 14624 Total Funded: \$105,500.00 Activity Name: 26 WOODDALE AVENUE Total Drawn: \$0.00																
Utilities - Home - Data Downloads - Print Page - Help	Funding Source <table border="1"> <thead> <tr> <th>Program</th> <th>Fund Type</th> <th>Source Name</th> <th>Source Type</th> <th>Recipient Name</th> <th>Available for Funding</th> <th>Drawn Amount</th> <th>Funded Amount</th> </tr> </thead> <tbody> <tr> <td>HOME</td> <td>AD</td> <td>HUD</td> <td>MC</td> <td>BOSTON, MA</td> <td>\$634,803.05</td> <td>\$0.00</td> <td>\$100,000.00</td> </tr> </tbody> </table>	Program	Fund Type	Source Name	Source Type	Recipient Name	Available for Funding	Drawn Amount	Funded Amount	HOME	AD	HUD	MC	BOSTON, MA	\$634,803.05	\$0.00	\$100,000.00
Program	Fund Type	Source Name	Source Type	Recipient Name	Available for Funding	Drawn Amount	Funded Amount										
HOME	AD	HUD	MC	BOSTON, MA	\$634,803.05	\$0.00	\$100,000.00										
Links - PDF Viewer - Support - CPD Home	Current Funding for This Source <table border="1"> <thead> <tr> <th>Grant Year (tip)</th> <th>Funded Amount</th> <th>Drawn Amount</th> </tr> </thead> <tbody> <tr> <td>2007</td> <td>\$ 100,000.00</td> <td>\$0.00</td> </tr> </tbody> </table>	Grant Year (tip)	Funded Amount	Drawn Amount	2007	\$ 100,000.00	\$0.00										
Grant Year (tip)	Funded Amount	Drawn Amount															
2007	\$ 100,000.00	\$0.00															

5. Drawdowns/Vouchers

5.1 Creating Drawdowns/Vouchers

- 1) Select **Funding/Drawdown** Tab
- 2) Click **Create Voucher** link on the left side under **Drawdown**

The screenshot displays the IDIS OnLine interface. At the top, the header reads "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "Community Development Systems Integrated Disbursement & Information System (IDIS)". The version number "IDIS version 11.0.1_3381" is visible in the top right corner. The main navigation bar includes tabs for "Projects/Activities", "Funding/Drawdown" (which is selected), "Grant", and "Grantee/PJ".

On the left side, there is a sidebar with user information: "User ID: C32177", "User Role: Grantee", "Organization: BOSTON", and a "Logout" link. Below this, there are sections for "Activity Funding" (with a "Search" link), "Drawdown" (with links for "Create Voucher", "Search Voucher", and "Approve Voucher"), "Receipt" (with links for "Add", "Search", and "Search Accounts"), and "Utilities" (with links for "Home", "Data Downloads", "Print Page", and "Help").

The main content area is titled "Activity Funding" and includes a "Search for Activities to Fund" section. This section contains search criteria fields: "Program:" (a dropdown menu set to "All"), "IDIS Project ID:" (a text input field), "Activity Status:" (a dropdown menu set to "All"), "Activity Name:" (a text input field), "IDIS Activity ID:" (a text input field), "* Activity Owner:" (a dropdown menu set to "BOSTON, MA"), "Program Year:" (a dropdown menu set to "All"), and "Grantee/PJ Activity ID:" (a text input field). At the bottom of the search criteria section are "Search" and "Reset" buttons.

- 3) **Create Voucher-Select Activities** page will appear
- 4) **Voucher Created For** and **Activity Owner** fields will be auto-populated
- 5) Enter **IDIS Activity ID** number(s)
- 6) Click the **Continue** button

User ID: C32177 User Role: Grantee Organization: BOSTON Logout	<table border="1"> <tr> <th>Projects/Activities</th> <th>Funding/Drawdown</th> <th>Grant</th> <th>Grantee/PJ</th> </tr> </table>	Projects/Activities	Funding/Drawdown	Grant	Grantee/PJ																																																																				
Projects/Activities	Funding/Drawdown	Grant	Grantee/PJ																																																																						
Activity Funding Search	Drawdown Create Voucher - Page 1 of 4 (Select Activities) <div>Continue</div>																																																																								
Drawdown Create Voucher Search Voucher Approve Voucher	<p>* Indicates Required Field</p> <p>*Voucher Created For: (tip) BOSTON, MA Requested LOCCS Submission Date: (tip)</p> <p style="text-align: right;">(ex: mm/dd/yyyy) Select Date</p> <p>*Activity Owner: (tip) BOSTON, MA</p> <p>*IDIS Activity ID</p> <table border="1"> <tr> <td>14629</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </table> <p>Search for Activities Reset</p>	14629																																																																							
14629																																																																									
Receipt Add Search Search Accounts																																																																									
Utilities Home Data Downloads Print Page Help																																																																									
Links PDF Viewer Support CPD Home HUD Home																																																																									

- 7) **Create Voucher – Drawdown Amounts** page will appear
- 8) Enter **Drawdown Amount**
- 9) Click **Confirm Voucher** button

User Role: Grantee
Organization:
BOSTON
- [Logout](#)

Activity Funding
- [Search](#)

Drawdown
- [Create Voucher](#)
- [Search Voucher](#)
- [Approve Voucher](#)

Receipt
- [Add](#)
- [Search](#)
- [Search Accounts](#)

Utilities
- [Home](#)
- [Data Downloads](#)
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- [Help](#)

Links
- [PDF Viewer](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

Drawdown
Create Voucher - Page 2 of 4 (Drawdown Amounts)

[Return to Select Activities](#) | [Confirm Voucher](#) | [Cancel Voucher](#)

Activity 1 of 1
IDIS Activity ID:
14629

Activity Name:
22 FERNBORO STREET

Voucher Created For:
BOSTON, MA

Grantee/PJ Activity ID:

Activity Owner:
BOSTON, MA

Available Drawdown Amounts for This Activity

Recipient Name	Program	Fund Type	Source Name	Source Type	Prior Year	Funded Amount	Available to Draw	Drawdown Amount
BOSTON, MA	CDBG	EN	HUD	MC	N	\$27,200.00	\$5,000.00	\$ <input type="text" value="0"/>

[Previous Activity](#) | [Next Activity](#)

Progress by Activity ID
Entered:
Not Entered: 14629 (#1)
Invalid:

[Return to Select Activities](#) | [Confirm Voucher](#) | [Cancel Voucher](#)

Page 36

10) **Create Voucher – Confirmation** page will appear

11) Click the **Generate Voucher** button to complete voucher creation

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Grantee
Organization: BOSTON
[Logout](#)

Projects/Activities **Funding/Drawdown** **Grant** **Grantee/PJ**

Drawdown

Create Voucher - Page 3 of 4 (Confirmation)

- Click "Generate Voucher" to complete voucher creation

[Generate Voucher](#) | [Cancel Voucher](#)

Voucher Created For:
BOSTON, MA

Requested LOCCS Submission Date:
 [Select Date](#)
(ex: mm/dd/yyyy)

Activity Owner:
BOSTON, MA

Voucher Details

Line Item #	IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount
1	14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$1,000.00
Total										\$1,000.00

[Generate Voucher](#) | [Cancel Voucher](#)

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

12) **Voucher created successfully** message will appear

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Grantee
Organization: BOSTON
[Logout](#)

Projects/Activities **Funding/Drawdown** **Grant** **Grantee/PJ**

Drawdown

Create Voucher - Page 4 of 4 (View)

- Voucher created successfully

[Return to Create Voucher](#)

Voucher Created For:
BOSTON, MA

IDIS Voucher #:
5000208

Activity Owner:
BOSTON, MA

Created By:
C32177

Requested LOCCS Submission Date:

Creation Date:
06/17/2009

Voucher Details

Line Item #	IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount
1	14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$1,000.00
Total										\$1,000.00

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

5.2 Approving Drawdowns/Vouchers

- 1) Select the **Funding/Drawdown** Tab
- 2) Click **Approve Voucher** link on the left side under **Drawdown**

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Grantee
Organization:
BOSTON

[Logout](#)

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ

Activity Funding

Search for Activities to Fund

Search Criteria

Program:
All ▼

Activity Name:

Program Year:
All ▼

IDIS Project ID:

IDIS Activity ID:

Grantee/PJ Activity ID:

Activity Status:
All ▼

***Activity Owner:**
BOSTON, MA ▼

|

- 3) The **Search Vouchers** page will appear
- 4) Enter the IDIS Activity Number in the **IDIS Activity ID** field, and select the applicable **Activity Owner**
- 5) User may also search vouchers by **IDIS Voucher #**, **Earliest Creation Date** and/or **Line Item Status**
- 6) Click the **Search** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Community Development Systems
Integrated Disbursement & Information System (IDIS)

IDS version 11.0.1_3301

User ID: C32177
User Role: Grantee
Organization: BOSTON
[Logout](#)

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Search Vouchers

Search Criteria
*Indicates Required Field

IDIS Voucher #:

IDIS Activity ID:

*Activity Owner:

Earliest Creation Date:
(ex: mm/dd/yyyy)

Line Item Status:

- 7) The search results will appear
- 8) Click **Maintain-Approve** link under the **Action** column

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
IDIS version 11.0.1_9381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Grantee
Organization: BOSTON
[Logout](#)

Projects/Activities
Funding/Drawdown
Grant
Grantee/PJ

Drawdown
 Search Vouchers For Approval

Search Criteria

IDIS Voucher #:

IDIS Activity ID:
14629

Activity Owner:
BOSTON, MA

Earliest Creation Date:
 [Select Date](#)
(ex: mm/dd/yyyy)

Line Item Status:
 Open

|

Results Page 1 of 1 (1 voucher line items found)

IDIS Voucher #	Line Item #	Creation Date	IDIS Actv ID	Activity Name	Line Item Status	Drawdown Amount	Action
5000190	1	06/10/2009	14629	22 FERNBORO STREET	Open	\$12,200.00	Maintain-Approve View

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

- 9) The **Maintain and Approve Voucher** page will appear
- 10) Click the **Approve** link under the **Action** column or click **Approve All Line Items** button to approve multiple line items, if applicable
- 11) The user may also **Cancel**, **Revise**, and/or **View** the voucher from the **Voucher Details** box if not ready for approval

DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Community Development Systems
Integrated Disbursement & Information System (IDIS)

IDIS version 11.0.1_3381

ID: C01133
Role:
Organization:
DN
out

[ty Funding](#)
[ch](#)
[down](#)
[ite Voucher](#)
[ch Voucher](#)
[rove Voucher](#)
[pt](#)
[ch](#)
[ch Accounts](#)
[es](#)
[Downloads](#)
[Page](#)

[Projects/Activities](#)
[Funding/Drawdown](#)
[Grant](#)
[Grantee/PJ](#)
[Admin](#)
[Reports](#)

Drawdown
Maintain and Approve Voucher
Return to Search Vouchers

Voucher Created For:
BOSTON, MA

IDIS Voucher #:
5000190

Activity Owner:
BOSTON, MA

Created By:
C32177

Creation Date:
06/10/2009

Voucher Details

Line Item #	IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount	Line Item Status	Submission Date	Action
1	14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$12,200.00	Open	06/10/2009	Approve Revise Cancel View

Approve All Line Items

- 12) The **Confirm Voucher Line Item Approval** page will appear
- 13) Click **Approve This Line Item** button
- 14) The user can also click the **Return to Maintain and Approve Voucher** button if approval is not ready

[Logout](#)

Confirm Voucher Line Item Approval

Activity Funding
[Search](#)

[Approve This Line Item](#) | [Return to Maintain and Approve Voucher](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Voucher Created For: BOSTON, MA
Activity Owner: BOSTON, MA
IDIS Voucher # / Line Item Grant #: 5000190/1
Created By: C32177
Creation Date: 06/10/2009
Transaction Type: Payment
Approved By:
Pay To: BOSTON, MA
Approval Date:

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

IDIS Information
IDIS Status: Voucher created but not yet approved in IDIS
Batch #:
Batch Date:
LOCCS Control #:
LOCCS Status: Blank

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

LOCCS Confirmation Information
Confirm Batch #:
Confirm Batch Date:
Confirmation Code:
Pay Method:
Payment Date:
Schedule #:
Reschedule:
Effective Date:

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Voucher Update
Voucher Updated By: C32177
Date Updated: 06/10/2009
Special Remarks:

Line Item

IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount	Line Item Status	Submission Date
14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$12,200.00	Open	06/10/2009 Select Date

15) Voucher item approved successfully message will appear

Grantee Organization: BOSTON Logout	Drawdown Maintain and Approve Voucher <ul style="list-style-type: none"> • Voucher item approved successfully 													
Activity Funding Search	<input type="button" value="Return to Search Vouchers"/>													
Drawdown Create Voucher Search Voucher Approve Voucher	Voucher Created For: BOSTON, MA						IDIS Voucher #: 5000190							
	Activity Owner: BOSTON, MA						Created By: C32177							
							Creation Date: 06/10/2009							
Receipt Add Search Search Accounts	Voucher Details													
	Line Item #	IDIS Actv ID	Activity Name	Program	Grant Year	Fund Type	Source Name	Source Type	Recipient Name	Prior Year	Drawdown Amount	Line Item Status	Submission Date	Acti
	1	14629	22 FERNBORO STREET	CDBG	2007	EN	HUD	MC	BOSTON, MA	N	\$12,200.00	Approved	06/17/2009	Revoke View
	<input type="button" value="Approve All Line Items"/>													
Utilities Home Data Downloads Print Page Help	<input type="button" value="Return to Search Vouchers"/>													
Links PDF Viewer Support CPD Home HUD Home														

6. Receipts

6.1 Add Receipts

- 1) Click **Funding/Drawdown** tab at top of screen

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Community Development Systems
Integrated Disbursement & Information System (IDIS)

IDIS version 11.0.1_3381

User ID: C01133
User Role: Grantee
Organization:
MILWAUKEE
- [Logout](#)

Activity Funding
- [Search](#)

Drawdown
- [Create Voucher](#)
- [Search Voucher](#)
- [Approve Voucher](#)

Receipt
- [Add](#)
- [Search](#)
- [Search Accounts](#)

Utilities
- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

[Projects/Activities](#)
[Funding/Drawdown](#)
[Grant](#)
[Grantee/PJ](#)
[Admin](#)
[Reports](#)

Activity Funding
Search for Activities to Fund

Search Criteria
Program:
All

IDIS Project ID:

Activity Status:
All

Activity Name:

IDIS Activity ID:

***Activity Owner:**
MILWAUKEE, WI

Program Year:
All

Grantee/PJ Activity ID:

|

- 2) Click the **Add** link on left side under **Receipt**
- 3) **Add Receipt** page will appear
- 4) Enter required data, including **Program, Program Year, Source Type, Fund Type** and **Amount**
- 5) Enter applicable information as needed, including **Receipt Type, IDIS Activity ID, Matrix Code, Estimated Amount, Grantee Receipt #**, and/or **Comments**
- 6) Click the **Save** button

Organization:
MILWAUKEE
[Logout](#)

Receipt
Add Receipt

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

***Indicates Required Field**

Receipt Created For:
MILWAUKEE

Receipt Status:
Original

Receipt

***Program:**
Select Program ▼

***Program Year:**
[Text Box]

***Source Type:**
Select Source ▼

***Fund Type:**
Select ▼

***Amount:**
\$ 0.00

Receipt Type:
Select Type ▼

IDIS Activity ID:
[Text Box]

Matrix Code:
Select Code ▼

Estimated Amount:
\$ 0.00

Grantee Receipt #:
[Text Box]

Comments:
[Text Area]

7) Message will appear stating receipt is posted and receipt number

[- Logout](#)

Activity Funding
[- Search](#)

Drawdown
[- Create Voucher](#)
[- Search Voucher](#)
[- Approve Voucher](#)

Receipt
[- Add](#)
[- Search](#)
[- Search Accounts](#)

Utilities
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[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Add Receipt

• PROGRAM INCOME Receipt posted. Please note Receipt # 5000045 and Grant # M-08-MC-55-0204.

Save

 |

Reset

***Indicates Required Field**

Receipt Created For:
MILWAUKEE

Receipt Status:
Original

Receipt

***Program:**
Select Program ▼

***Program Year:**

***Source Type:**
Select Source ▼

***Fund Type:**
Select ▼

***Amount:**
\$

Receipt Type:
Select Type ▼

IDIS Activity ID:

Matrix Code:
Select Code ▼

Estimated Amount:
\$

Grantee Receipt #:

Comments:

Page 46

6.2 Search /Edit Receipts

- 1) Click **Funding/Drawdown** tab at top of screen

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

IDIS version 11.0.1_3381

Community Development Systems

Integrated Disbursement & Information System (IDIS)

User ID: C01133

User Role: Grantee

Organization: MILWAUKEE

- [Logout](#)

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

Reports

Activity Funding

- [Search](#)

Drawdown

- [Create Voucher](#)

- [Search Voucher](#)

- [Approve Voucher](#)

Receipt

- [Add](#)

- [Search](#)

- [Search Accounts](#)

Utilities

- [Home](#)

- [Data Downloads](#)

- [Print Page](#)

- [Help](#)

Activity Funding

Search for Activities to Fund

Search Criteria

Program:

All

IDIS Project ID:

Activity Status:

All

Activity Name:

IDIS Activity ID:

*Activity Owner:

MILWAUKEE, WI

Program Year:

All

Grantee/PJ Activity ID:

Search

Reset

Page 47

- 2) Click the **Search** link on left side under **Receipt**
- 3) **Search Receipts** page will appear
- 4) Enter applicable **Search Criteria**, including **Program, Program Year, Fund Type, Receipt Number, Amount, Date Created, Receipt Status**, and/or **Receipt Created For**
- 5) Click **Search** button

The screenshot displays the IDIS OnLine interface. At the top, the header reads "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "Community Development Systems Integrated Disbursement & Information System (IDIS)". The version number "IDIS version 11.0.1_3381" is visible in the top right. A navigation bar includes tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports".

On the left sidebar, the user information is shown: "User ID: C01133", "User Role: Grantee", and "Organization: MILWAUKEE". Below this is a "Logout" link. The sidebar also contains sections for "Activity Funding" (with a "Search" link), "Drawdown" (with links for "Create Voucher", "Search Voucher", and "Approve Voucher"), "Receipt" (with links for "Add", "Search", and "Search Accounts"), and "Utilities" (with links for "Home", "Data Downloads", "Print Page", and "Help").

The main content area is titled "Receipt" and "Search Receipts". It features a "Search Criteria" section with the following fields:

- Program:** A dropdown menu currently set to "All".
- Program Year:** A text input field.
- Fund Type:** A dropdown menu currently set to "All".
- Receipt Number:** A text input field.
- Amount:** A text input field.
- Date Created:** A text input field with a "Select Date" link and a format example "(ex: mm/dd/yyyy)".
- Receipt Status:** A dropdown menu currently set to "All".
- Receipt Created For:** A text input field.

At the bottom of the search criteria section are "Search" and "Reset" buttons.

- 6) Search results page will appear
- 7) Click **Edit** under **Action** column to make any changes to the Receipt information

antee
ganization:
LWAWKEE

[Logout](#)

Activity Funding
[Search](#)

Download
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Receipt

Search Receipts

Search Criteria

Program:
HOME ▼

Receipt Number:

Receipt Status:
All ▼

Program Year:

Amount:

Receipt Created For:

Fund Type:
All ▼

Date Created:
 [Select Date](#)
(ex: mm/dd/yyyy)

Search |
 Reset

Results Page 1 of 13

Receipt Number	Program	Program Year	Fund Type	Receipt Created For	Amount	Date Created	Receipt Status	Action
5000045	HOME	2008	PI	MILWAUKEE	\$4,000.00	06/10/2009	Original	Edit View
243462	HOME	2008	PI	MILWAUKEE	\$4,998.00	07/28/2008	Original	Edit View
242158	HOME	2008	PI	MILWAUKEE	\$44,250.98	07/07/2008	Original	Edit View
241865	HOME	2008	PI	MILWAUKEE	\$49,458.90	06/30/2008	Original	Edit View
240706	HOME	2008	PI	MILWAUKEE	\$2,261.00	06/16/2008	Original	Edit View
240291	HOME	2008	PI	MILWAUKEE	\$46,385.54	06/10/2008	Original	Edit View
237602	HOME	2008	PI	MILWAUKEE	\$1,650.00	04/28/2008	Original	Edit View
236644	HOME	2008	PI	MILWAUKEE	\$80,764.20	04/14/2008	Original	Edit View

- 8) **Edit Receipt** page will appear
- 9) Enter changes as needed
- 10) Click the **Save** button

Organization: MILWAUKEE - Logout	Receipt Edit Receipt
Activity Funding - Search	<input type="button" value="Save"/> <input type="button" value="Return to Search Receipts"/>
Drawdown - Create Voucher - Search Voucher - Approve Voucher	* Indicates Required Field
Receipt - Add - Search - Search Accounts	Receipt Created For: MILWAUKEE Receipt Number: 5000045 Receipt Status: Modified <input type="button" value="v"/> Associated Grant #: M-08-MC-55-0204
Utilities - Home - Data Downloads - Print Page - Help	Receipt Program: HOME Program Year: 2008 Source Type: MC Fund Type: PI * Amount: \$ 4000.00 Receipt Type: IDIS Activity ID: <input type="text"/> Matrix Code: Select Code <input type="button" value="v"/> Grantee Receipt Number: <input type="text"/>
Links - PDF Viewer - Support - CPD Home - HUD Home	Comments: <input type="text"/>

6.3 View Receipts

- 1) Click **Funding/Drawdown** tab at top of screen

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C01133
User Role: Grantee
Organization: MILWAUKEE
[Logout](#)

Projects/Activities **Funding/Drawdown** **Grant** **Grantee/PJ** **Admin** **Reports**

Activity Funding
Search for Activities to Fund

Search Criteria

Program: All IDIS Project ID: Activity Status: All

Activity Name: IDIS Activity ID: *Activity Owner: MILWAUKEE, WI

Program Year: All Grantee/PJ Activity ID:

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

- 2) Click the **Search** link on left side under **Receipt**
- 3) **Search Receipts** page will appear
- 4) Enter applicable **Search Criteria**, including **Program, Program Year, Fund Type, Receipt Number, Amount, Date Created, Receipt Status**, and/or **Receipt Created For**
- 5) Click **Search** button

The screenshot displays the IDIS OnLine interface. At the top, the header reads "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "Community Development Systems Integrated Disbursement & Information System (IDIS)". The version number "IDIS version 11.0.1_3381" is in the top right. A navigation bar includes links for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports".

On the left sidebar, the user information is shown: "User ID: C01133", "User Role: Grantee", and "Organization: MILWAUKEE". Below this is a "Logout" link. The sidebar also contains sections for "Activity Funding" (with a "Search" link), "Drawdown" (with links for "Create Voucher", "Search Voucher", and "Approve Voucher"), "Receipt" (with links for "Add", "Search", and "Search Accounts"), and "Utilities" (with links for "Home", "Data Downloads", "Print Page", and "Help").

The main content area is titled "Receipt" and "Search Receipts". It features a "Search Criteria" section with the following fields:

- Program:** A dropdown menu currently set to "All".
- Program Year:** A text input field.
- Fund Type:** A dropdown menu currently set to "All".
- Receipt Number:** A text input field.
- Amount:** A text input field.
- Date Created:** A text input field with a "Select Date" link and a note "(ex: mm/dd/yyyy)".
- Receipt Status:** A dropdown menu currently set to "All".
- Receipt Created For:** A text input field.

At the bottom of the search criteria section are "Search" and "Reset" buttons.

- 6) Search Results Page will appear
- 7) Click **View** under the **Action** column for a summary of Receipt information

Antee
Organization:
MILWAUKEE
[Logout](#)

Activity Funding
[Search](#)

Download
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
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Links
[PDF Viewer](#)
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[CPD Home](#)
[HUD Home](#)

Receipt

Search Receipts

Search Criteria

Program:
HOME ▼

Receipt Number:

Receipt Status:
All ▼

Program Year:

Amount:

Receipt Created For:

Fund Type:
All ▼

Date Created:
 [Select Date](#)
(ex: mm/dd/yyyy)

|

Results Page 1 of 13

Receipt Number	Program	Program Year	Fund Type	Receipt Created For	Amount	Date Created	Receipt Status	Action
5000045	HOME	2008	PI	MILWAUKEE	\$4,000.00	06/10/2009	Original	Edit View
243462	HOME	2008	PI	MILWAUKEE	\$4,998.00	07/28/2008	Original	Edit View
242158	HOME	2008	PI	MILWAUKEE	\$44,250.98	07/07/2008	Original	Edit View
241865	HOME	2008	PI	MILWAUKEE	\$49,458.90	06/30/2008	Original	Edit View
240706	HOME	2008	PI	MILWAUKEE	\$2,261.00	06/16/2008	Original	Edit View
240291	HOME	2008	PI	MILWAUKEE	\$46,385.54	06/10/2008	Original	Edit View
237602	HOME	2008	PI	MILWAUKEE	\$1,650.00	04/28/2008	Original	Edit View
236644	HOME	2008	PI	MILWAUKEE	\$80,764.20	04/14/2008	Original	Edit View

8) View Receipt page will appear

Organization: MILWAUKEE - Logout	Receipt View Receipt	
Activity Funding - Search	Return to Search Receipts	
Drawdown - Create Voucher - Search Voucher - Approve Voucher	Receipt Created For: MILWAUKEE Receipt Number: 5000045	Receipt Status: Original Associated Grant #: M-08-MC-55-0204
Receipt - Add - Search - Search Accounts	<div><div>Receipt Program: HOME Program Year: 2008 Source Type: MC Fund Type: PI Amount: \$4,000.00</div><div>Receipt Type: IDIS Activity ID: Matrix Code: Grantee Receipt #:</div></div>	
Utilities - Home - Data Downloads - Print Page - Help	Comments: <div></div>	
Links - PDF Viewer - Support - CPD Home - HUD Home		

6.4 View Receipt Accounts

- 1) Click the **Funding/Drawdown** tab at top of screen

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

IDIS version 11.0.1_3381

Community Development Systems

Integrated Disbursement & Information System (IDIS)

User ID: C01133

User Role: Grantee

Organization: MILWAUKEE

- [Logout](#)

Activity Funding

- [Search](#)

Drawdown

- [Create Voucher](#)

- [Search Voucher](#)

- [Approve Voucher](#)

Receipt

- [Add](#)

- [Search](#)

- [Search Accounts](#)

Utilities

- [Home](#)

- [Data Downloads](#)

- [Print Page](#)

- [Help](#)

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

Reports

Activity Funding

Search for Activities to Fund

Search Criteria

Program:

All

IDIS Project ID:

Activity Status:

All

Activity Name:

IDIS Activity ID:

*Activity Owner:

MILWAUKEE, WI

Program Year:

All

Grantee/PJ Activity ID:

Search

Reset

Page 55

- 2) Click the **Search Accounts** link on left side under **Receipt**
- 3) **View Receipt Accounts** page will appear
- 4) Enter applicable **Search Criteria**, including **Program**, **Program Year**, **Fund Type**, and/or **Receipt Created For**
- 5) Click **Search** button

The screenshot displays the IDIS OnLine web application interface. At the top, a header bar contains the text "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this is a blue banner with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)" on the left, and the "CDS" logo on the right. A navigation menu below the banner includes "Projects/Activities", "Funding/Drawdown" (highlighted in yellow), "Grant", "Grantee/PJ", "Admin", and "Reports".

On the left side, a sidebar shows user information: "User ID: C01133", "User Role: Grantee", "Organization: MILWAUKEE", and a "Logout" link. Below this are several menu sections: "Activity Funding" with a "Search" link; "Drawdown" with links for "Create Voucher", "Search Voucher", and "Approve Voucher"; "Receipt" with links for "Add", "Search", and "Search Accounts" (which is highlighted in blue); and "Utilities" with links for "Home", "Data Downloads", "Print Page", and "Help".

The main content area is titled "Receipt" and "View Receipt Accounts". It features a "Search Criteria" section with three dropdown menus: "Program:" (set to "All"), "Program Year:" (empty), and "Fund Type:" (set to "All"). Below these is a "Receipt Created For:" text input field. At the bottom of the search section are "Search" and "Reset" buttons.

6) Search Results Page will appear

antee
ganization:
LWAWKEE

[Logout](#)

Receipt

View Receipt Accounts

Activity Funding
[Search](#)

Drawdown
[Create Voucher](#)
[Search Voucher](#)
[Approve Voucher](#)

Receipt
[Add](#)
[Search](#)
[Search Accounts](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Search Criteria

Program: CDBG

Program Year:

Fund Type: All

Receipt Created For:

|

Results Page 1 of 3

Program	Source Type	Program Year	Fund Type	Estimated Amount	Receipt Created For	Amount	Drawdown Amount
CDBG	MC	2008	PI	\$500,000.00	MILWAUKEE	\$324,519.41	\$266,548.23
CDBG	MC	2008	RL	\$10,000.00	MILWAUKEE	\$61,483.19	\$55,179.77
CDBG	MC	2007	PI	\$1,000,000.00	MILWAUKEE	\$562,116.37	\$541,344.82
CDBG	MC	2007	RL	\$200,000.00	MILWAUKEE	\$62,161.90	\$61,011.90
CDBG	MC	2006	PI	\$1,150,000.00	MILWAUKEE	\$977,075.76	\$977,075.76
CDBG	MC	2006	RL	\$250,000.00	MILWAUKEE	\$183,494.50	\$181,994.50
CDBG	MC	2005	PI	\$1,500,000.00	MILWAUKEE	\$1,139,659.96	\$1,138,659.96
CDBG	MC	2005	RL	\$500,000.00	MILWAUKEE	\$251,627.98	\$251,627.98
CDBG	MC	2004	PI	\$1,200,000.00	MILWAUKEE	\$1,318,763.20	\$1,318,763.20
CDBG	MC	2004	RL	\$100,000.00	MILWAUKEE	\$216,463.83	\$216,463.83

7. Subfunds

7.1 Add Subfunds

- 1) Click **Grant** tab at top of screen
- 2) Click **Add** link on left side under **Subfund**
- 3) Enter applicable **Search Criteria**, including **Program**, **Fund Type**, **Grant #** and/or **Grant Year**
- 4) Click the **Search** button

The screenshot displays the IDIS OnLine interface for the U.S. Department of Housing and Urban Development. The header includes the department name, 'Community Development Systems', and 'Integrated Disbursement & Information System (IDIS)'. The version number 'IDIS version 11.0.1_3381' is shown in the top right. A navigation bar at the top contains tabs: 'Projects/Activities', 'Funding/Drawdown', 'Grant' (selected), 'Grantee/PJ', 'Admin', and 'Reports'.

On the left side, there is a sidebar with user information: 'User ID: C01133', 'User Role: Grantee', 'Organization: MILWAUKEE', and a 'Logout' link. Below this are several menu sections: 'Grant' with a 'Search' link, 'Subfund' with 'Add' and 'Search' links, 'Subgrant' with 'Add' and 'Search' links, 'Utilities' with 'Home', 'Data Downloads', 'Print Page', and 'Help' links, and 'Links' with 'PDF Viewer', 'Support', 'CPD Home', and 'HUD Home' links.

The main content area is titled 'Subfund' and 'Add Subfunds'. It contains a 'Search Criteria' section with the following fields:

- Program:** A dropdown menu currently set to 'All'.
- Fund Type: (tip)**: A dropdown menu currently set to 'Select'.
- Grant #: (tip)**: A text input field.
- Grant Year: (tip)**: A dropdown menu currently set to 'Select'.

 Below these fields are 'Search' and 'Reset' buttons.

At the bottom of the main content area, it states 'There are no results to display.'

- 5) Search results will appear
- 6) Click the **Add** link in the **Action** column

Organization:
MILWAUKEE
[Logout](#)

Grant
[Search](#)

Subfund
[Add](#)
[Search](#)

Subgrant
[Add](#)
[Search](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Subfund
Add Subfunds

Search Criteria
Program:
HOME

Fund Type: (tip)
Select

Grant #: (tip)

Grant Year: (tip)
Select

|

Results Page 1 of 2

Grantee/PJ Name	Program	Grant Year	Grant #	Fund Type	Authorized Amount	Action
MILWAUKEE	HOME	2008	M-08-MC-55-0204	CR	\$1,860,000.00	Add
MILWAUKEE	HOME	2007	M-07-MC-55-0204	CR	\$1,832,251.08	Add
MILWAUKEE	HOME	2006	M-06-MC-55-0204	CR	\$1,528,183.81	Add
MILWAUKEE	HOME	2005	M-05-MC-55-0204	CR	\$1,080,000.00	Add
MILWAUKEE	HOME	2004	M-04-MC-55-0204	CR	\$1,080,279.79	Add
MILWAUKEE	HOME	2003	M-03-MC-55-0204	CR	\$1,066,369.80	Add
MILWAUKEE	HOME	2002	M-02-MC-55-0204	CR	\$1,410,300.00	Add
MILWAUKEE	HOME	2001	M-01-MC-55-0204	CR	\$1,746,557.00	Add
MILWAUKEE	HOME	2000	M-00-MC-55-0204	CR	\$1,272,600.00	Add
MILWAUKEE	HOME	1999	M-99-MC-55-0204	CR	\$1,166,871.00	Add

1 2 [Next 10 Results](#)



- 7) **Add Subfund** page will appear
- 8) Enter new amount in the **Authorized Amount for this Subfund** box
- 9) Click the **Save** button

Integrated Disbursement & Information System (IDIS)

[Projects/Activities](#)
[Funding/Drawdown](#)
[Grant](#)
[Grantee/PJ](#)
[Admin](#)
[Reports](#)

User ID: C01133
User Role: Grantee
Organization: MILWAUKEE
[Logout](#)

Subfund
Add Subfund

Grant
[Search](#)

Subfund
[Add](#)
[Search](#)

Subgrant
[Add](#)
[Search](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Save
Return to Search Subfunds

***Indicates Required Field**

Grantee/PJ Name:
MILWAUKEE , WI

Grant #: **(tip)**
M-08-MC-55-0204

Program: **(tip)**
HOME

Grant Year: **(tip)**
2008

Grant Status: **(tip)**
Active

Grant Blocked: **(tip)**
No

***Fund Type: (tip)**
Select Option
Check Balance

Source Fund: CR

Subfund Amount	
Minimum Authorized Amount Required	
Maximum Authorized Amount Allowed	
Available to Subfund	
Authorized Amount for this Subfund (tip)	\$

Save
Return to Search Subfunds

8. Subgrants

8.1 Add Subgrants

- 1) Click the **Grant** tab at top of screen
- 2) Click **Add** link on left side under **Subgrant**
- 3) Enter required data, including **Program, Grant Year, Grant #, Fund Type, Subgrant to Organization, New Subgrant Amount**, and **Banking**
- 4) Click **Select Organization** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

Community Development Systems

Integrated Disbursement & Information System (IDIS)

IDIS version 11.0.1_9381

User ID: C01133

User Role: Grantee

Organization: SOUTH DAKOTA

- Logout

Grant

- Search

Subfund

- Add

- Search

Subgrant

- Add

- Search

Utilities

- Home

- Data Downloads

- Print Page

- Help

Links

- PDF Viewer

- Support

- CPD Home

- HUD Home

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

Reports

Subgrant

Add Subgrant

*Indicates Required Field

*Program (tip)	*Grant Year (tip)	*Grant # (tip)	*Fund Type (tip)
Select	Select	Select	Select

*Subgrant to Organization	Maximum Subgrant Amount	*New Subgrant Amount	*Banking
Select Organization		\$	<input type="radio"/> Yes <input checked="" type="radio"/> No

Check Balance | Save | Reset

Show Availability

Program: (tip)	Grant Year: (tip)	Grant #: (tip)	Fund Type: (tip)	Show
Select	Select	Select	Select	

- 5) **Select Organization** page will appear
- 6) Enter applicable **Search Criteria**, including **Organization Name**, **City**, **DUNS #**, and/or **EIN/TIN #**
- 7) Click the **Search** button

The screenshot displays the IDIS OnLine interface. At the top, a header bar contains the text "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this is a blue banner with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)". A navigation bar includes tabs for "Projects/Activities", "Funding/Drawdown", "Grant" (which is highlighted), "Grantee/PJ", "Admin", and "Reports".

On the left side, there is a sidebar with the following information:

- User ID: C01133
- User Role: Grantee
- Organization: MILWAUKEE
- Logout

Below the sidebar, there are several sections:

- Grant**
 - Search
- Subfund**
 - Add
 - Search
- Subgrant**
 - Add
 - Search
- Utilities**
 - Home
 - Data Downloads
 - Print Page
 - Help
- Links**
 - PDF Viewer
 - Support
 - CPD Home
 - HUD Home

The main content area is titled "Subgrant" and contains the text "Select Organization". Below this is a "Cancel" button. Further down, there is a "Search Criteria" section with the following fields:

- Organization Name:
- City:
- DUNS #: (ex: 00-000-0000)
- EIN/TIN #: (ex: 00-0000000)

At the bottom of the search criteria section are "Search" and "Reset" buttons. A blue bar with a home icon is located at the bottom of the main content area.

8) Choose correct **Organization Name** by clicking the applicable radio button

9) Click the **Select** button

The screenshot shows a search results page for subgrants. On the left is a navigation menu with links for Search, Add, Utilities, and Links. The main content area displays a table of results for 'Subgrant to:'. The table has columns for Organization Name, City, LOCCS Banking Access, DUNS #, and EIN/TIN #. Several organizations are listed, including 30TH STREET ICC, 30TH STREET INDUSTRIAL CORRIDOR CORP, ABBOTSFORD, ACAP, INC, ACCESS TO INDEPENDENCE, ACTS, ADAMS COUNTY, ADOPT-A-NEIGHBORHOOD, INC, and ADVOCAP. The 'ACAP, INC' row is selected with a radio button. At the bottom of the table, there are pagination links (1, 2, 3, 4, 5, 6, 7, 8, 9, 10, Next, 10 Results) and buttons for Select, Cancel, and Add Organization.

Organization Name	City	LOCCS Banking Access	DUNS #	EIN/TIN #
<input type="radio"/> 30TH STREET ICC	MILWAUKEE COUNTY CONSORTIUM	No		
<input type="radio"/> 30TH STREET INDUSTRIAL CORRIDOR CORP	MILWAUKEE	No		
<input type="radio"/> 30TH STREET INDUSTRIAL CORRIDOR CORP	MILWAUKEE COUNTY CONSORTIUM	No		
<input type="radio"/> ABBOTSFORD	ABBOTSFORD	No		
<input checked="" type="radio"/> ACAP, INC	WAUKESHA COUNTY CONSORTIUM	No		
<input type="radio"/> ACCESS TO INDEPENDENCE 22 NORTH SECOND STREET	MADISON	No		39-1240200
<input type="radio"/> ACTS	MILWAUKEE	No		
<input type="radio"/> ADAMS COUNTY	ADAMS COUNTY	No		
<input type="radio"/> ADOPT-A-NEIGHBORHOOD, INC	ADOPT-A-NEIGHBORHOOD, INC	No		
<input type="radio"/> ADVOCAP	NEENAH	No		

10) Enter **New Subgrant Amount** and **Banking** option

11) Click the **Save** button

The screenshot shows the 'Add Subgrant' form in the IDIS system. The header includes the U.S. Department of Housing and Urban Development logo and the IDIS version number. The left sidebar contains navigation links for User ID, Grant, Subfund, Subgrant, Utilities, and Links. The main form area is titled 'Subgrant' and includes a section for 'Add Subgrant'. Below this, there are fields for *Program (tip), *Grant Year (tip), *Grant # (tip), and *Fund Type (tip). A table below these fields shows the 'Subgrant to Organization' (ADOPT-A-NEIGHBORHOOD, INC), 'Maximum Subgrant Amount' (\$0.00), 'New Subgrant Amount' (a text input field), and 'Banking' option (radio buttons for Yes and No). At the bottom, there are buttons for Check Balance, Save, and Reset. A 'Show Availability' section at the bottom right contains dropdown menus for Program, Grant Year, Grant #, and Fund Type, along with a Show button.

9. Admin Functions

9.1 Grantee - Editing a User Profile

- 1) Click the **Admin** tab at top of screen

The screenshot displays the IDIS OnLine web application interface. At the top, a header bar contains the text "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this, a blue banner reads "Community Development Systems Integrated Disbursement & Information System (IDIS)" with the CDS logo on the right. A navigation menu below the banner includes tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin" (which is highlighted), and "Reports".

On the left side, a sidebar contains user information: "User ID: C15581", "User Role: Grantee", and "Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT", along with a "Logout" link. Below this are sections for "Utilities" (Home, Data Downloads, Print Page, Help) and "Links" (PDF Viewer, Support, CPD Home, HUD Home).

The main content area features a "Welcome to the Integrated Disbursement and Information System" message. Below this is an "IDIS News" section stating "No news to display." To the right, there are two "Warning!" messages: one about federal information misuse and another about session timeout. Below the warnings, text instructs users to close MicroStrategy windows before opening new ones. At the bottom, it notes "Content updated Nov 14, 2008" and provides contact information for the U.S. Department of Housing and Urban Development.

- 2) **Search User Profiles** page will appear
- 3) Enter applicable **Search Criteria**, including **User ID, First Name, Last Name, Select Role, Organization name**, and/or **Status**
- 4) Click the **Search** button

The screenshot shows the IDIS OnLine interface. At the top, it says "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this is a blue header with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)". A navigation bar contains tabs: "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin" (highlighted), and "Reports".

On the left, a sidebar shows user information: "User ID: C15581", "User Role: Grantee", "Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT", and a "Logout" link. Below this are sections for "Admin" (with links to "Search User Profiles" and "Table Maintenance"), "Utilities" (with links to "Home", "Data Downloads", "Print Page", and "Help"), and "Links" (with links to "PDF Viewer", "Support", "CPD Home", and "HUD Home").

The main content area is titled "User Profile" and "Search User Profiles". It contains a "Search Criteria" form with the following fields: "User ID:" (text input), "First Name:" (text input), "Last Name:" (text input), "Select Role:" (dropdown menu with "All" selected), "Organization name:" (text input), and "Status:" (dropdown menu with "Select Status" selected). Below the form are "Search" and "Reset" buttons.

- 5) Search results page will appear
- 6) Click **Edit** under **Action** column to make any changes to the User Profile

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

IDIS version 11.0.1_3381

Community Development Systems

Integrated Disbursement & Information System (IDIS)

User ID: C32177

User Role: Headquarters

Organization: Headquarters

- [Logout](#)

Admin

- [Add User Profile](#)

- [Search User Profiles](#)

- [HOME Match Liability Rate](#)

- [Table Maintenance](#)

Utilities

- [Home](#)

- [Data Downloads](#)

- [Print Page](#)

- [Help](#)

Links

- [PDF Viewer](#)

- [Support](#)

- [CPD Home](#)

- [HUD Home](#)

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

Reports

User Profile

Search User Profiles

Search Criteria

User ID:

First Name:

Last Name:

(ex: unnnnn)

Organization name:

Status:

Select Role:

All

Select Status

Search

Reset

Results Page 1 of 1

User ID	First Name	Last Name	Status	Action
C15581	TONY	PULLIAM	Active	Edit View

Page 66

- 7) **Edit User Profile** page will appear
- 8) Enter changes as needed
- 9) Click the **Save** button

User Role: Headquarters
Organization:
Headquarters
[- Logout](#)

Admin
[- Add User Profile](#)
[- Search User Profiles](#)
[- HOME Match Liability Rate](#)
[- Table Maintenance](#)

Utilities
[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links
[- PDF Viewer](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

Admin
Edit User Profile (Page 1)

[Save](#) | [Cancel](#) | [History](#) | [Reset Status](#)

***Indicates Required Field**
***User ID:**

(ext: xxxxxx)
***Status:**
Active
Status Modified Date:
06/18/2009

Existing User Roles:
[Headquarters](#)
[Field Office](#)
[Grantee](#)

User Information

***First Name:**

Middle Initial:

***Last Name:**

***Email:**

Department:

Supervisor's ID:

Phone #: (tip)

Ext:

Fax: (tip)

9.2 Grantee - Editing Existing User Roles

- 1) Click the **Admin** tab at top of screen

The screenshot displays the IDIS OnLine Admin interface. At the top, a header bar contains the text "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this is a blue banner with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)" on the left, and a "CDS" logo on the right. A navigation bar below the banner includes tabs for "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin" (which is highlighted in yellow), and "Reports".

On the left side of the main content area, there is a sidebar with several sections:

- User ID:** C15581
User Role: Grantee
Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT
[Logout](#)
- Admin**
 - [Search User Profiles](#)
 - [Table Maintenance](#)
- Utilities**
 - [Home](#)
 - [Data Downloads](#)
 - [Print Page](#)
 - [Help](#)
- Links**
 - [PDF Viewer](#)
 - [Support](#)
 - [CPD Home](#)
 - [HUD Home](#)

The main content area is titled "User Profile" and contains a "Search User Profiles" section. This section includes a "Search Criteria" box with the following fields:

- User ID:**
- First Name:**
- Last Name:**
- Select Role:** (with a dropdown arrow)
- Organization name:**
- Status:** (with a dropdown arrow)

Below the search criteria box are two buttons: "Search" and "Reset".

- 2) **Search User Profiles** page will appear
- 3) Enter applicable Search Criteria, including **User ID, First Name, Last Name, Select Role, Organization name,** and/or **Status**
- 4) Click the **Search** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C15581
User Role: Grantee
Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT
[Logout](#)

Admin
[Search User Profiles](#)
[Table Maintenance](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Projects/Activities **Funding/Drawdown** **Grant** **Grantee/PJ** **Admin** **Reports**

User Profile

Search User Profiles

Search Criteria

User ID: **First Name:** **Last Name:**

(ex: xxxxxxxx)

Select Role: **Organization name:** **Status:**

All Select Status

- 5) Search results page will appear
- 6) Click **Edit** under **Action** column to make any changes to the User Profile

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
IDIS version 11.0.1_3381

Community Development Systems

Integrated Disbursement & Information System (IDIS)

[Projects/Activities](#)
[Funding/Drawdown](#)
[Grant](#)
[Grantee/PJ](#)
[Admin](#)
[Reports](#)

User ID: C32177
User Role: Headquarters
Organization: Headquarters
[Logout](#)

Admin
[Add User Profile](#)
[Search User Profiles](#)
[HOME Match Liability Rate](#)
[Table Maintenance](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

User Profile

Search User Profiles

Search Criteria

User ID:

(ex: xxxxxx)

First Name:

Last Name:

Select Role:

Organization name:

Status:

|

Results Page 1 of 1

User ID	First Name	Last Name	Status	Action
C15581	TONY	PULLIAM	Active	Edit View

- 7) **Edit User Profile** page will appear
- 8) Click **Grantee** link under **Existing User Roles**

User Role: Headquarters
Organization: Headquarters
[Logout](#)

Admin
[Add User Profile](#)
[Search User Profiles](#)
[HOME Match Liability Rate](#)
[Table Maintenance](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Admin

Edit User Profile (Page 1)

***Indicates Required Field**

***User ID:**

(ex: xxxxxx)

***Status:**

Status Modified Date:
06/18/2009

Existing User Roles:
[Headquarters](#)
[Field Office](#)
[Grantee](#)

User Information

***First Name:**

Middle Initial:

***Last Name:**

***Email:**

Department:

Supervisor's ID:

Phone #: (tip) **Ext:**

Fax: (tip)

- 9) **Edit Grantee/PJ User Profile** page will appear
- 10) **Grantee/PJ User Profiles** can be changed to **Active**, **Inactive**, or **Delete** from the drop-down menu under the **Status** column
- 11) Click the **Save** button
- 12) To edit **Grantee/PJ User Profile Privileges** click **Edit Access** link under **Action** column

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
Community Development Systems
Integrated Disbursement & Information System (IDIS)

IDIS version 11.0.1_3381

User ID: C15581

User Role: Grantee

Organization: VERMONT

Logout

Admin

Search User Profiles

Table Maintenance

Utilities

Home

Data Downloads

Print Page

Help

Links

PDF Viewer

Support

CPD Home

HUD Home

Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

Reports

Admin

Edit Grantee/PJ User Profile (Page 2)

Save

Cancel

*Indicates Required Field

User ID: C15581

Name: TONY PULLIAM

Assigned User Role: Grantee

Grantee/PJ Profiles

Grantee/PJ Name	City	State	EIN/TIN #	Status	Action
LOUISVILLE - JEFFERSON COUNTY METRO GOVT	LOUISVILLE	KY	32-0049006	Active	No Access
VERMONT	MONTPELIER	VT	03-6000274	Active	Edit Access
MACON	CITY OF MACON	GA	58-6000612	Active	No Access

Add Another Grantee/PJ Access

- 13) Edit Grantee/PJ User Profile page will appear
- 14) Grantee/PJ User Profile Privileges can be selected or removed
- 15) After all selections have been made click the **Save** button

Projects/Activities Funding/Drawdown Grant Grantee/PJ Admin Reports	
<div> <div> User ID: C15581 User Role: Grantee Organization: VERMONT Logout </div> <div> Admin Search User Profiles Table Maintenance </div> <div> Utilities Home Data Downloads Print Page Help </div> <div> Links PDF Viewer Support CPD Home HUD Home </div> </div>	
<div> Admin Edit Grantee/PJ User Profile (Page 4) </div> <div> <div>Save Cancel History</div> <div> <div> User ID: C15581 Assign User Role: Grantee Grantee/PJ Name: VERMONT </div> <div> Name: TONY PULLIAM Status: Active </div> </div> <div> <div> Program Privileges <input checked="" type="checkbox"/> CDBG <input checked="" type="checkbox"/> ESG <input checked="" type="checkbox"/> HOME <input checked="" type="checkbox"/> HOPWA </div> <div> Administrative Privileges <input checked="" type="checkbox"/> Administration <input checked="" type="checkbox"/> Report <input checked="" type="checkbox"/> Table Maintenance <input checked="" type="checkbox"/> Add Subordinate <input checked="" type="checkbox"/> Edit Subordinate </div> <div> Activity Privileges <input checked="" type="checkbox"/> Set up Activity <input checked="" type="checkbox"/> Update Activity <input checked="" type="checkbox"/> View Activity </div> <div> Drawdown Privileges <input checked="" type="checkbox"/> Drawdown Approval <input checked="" type="checkbox"/> Request Drawdown <input checked="" type="checkbox"/> View Drawdown </div> </div> </div>	

9.3 Grantee - Viewing Existing User Roles

- 1) Click the **Admin** tab at top of screen

The screenshot displays the IDIS OnLine interface. At the top, a header bar contains the text "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this is a blue banner with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)". A navigation bar below the banner includes tabs: "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin" (highlighted in yellow), and "Reports".

On the left side, there is a sidebar with the following sections:

- User ID:** C15581
User Role: Grantee
Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT
[Logout](#)
- Admin**
 - [Search User Profiles](#)
 - [Table Maintenance](#)
- Utilities**
 - [Home](#)
 - [Data Downloads](#)
 - [Print Page](#)
 - [Help](#)
- Links**
 - [PDF Viewer](#)
 - [Support](#)
 - [CPD Home](#)
 - [HUD Home](#)

The main content area is titled "User Profile" and contains a "Search User Profiles" section. This section includes a "Search Criteria" box with the following fields:

- User ID:**
- First Name:**
- Last Name:**
- Select Role:** (ex: xxxxxxxx)
- Organization name:**
- Status:** (Select Status)

Below the search criteria box are two buttons: "Search" and "Reset".

- 2) **Search User Profiles** page will appear
- 3) Enter applicable **Search Criteria**, including **User ID**, **First Name**, **Last Name**, **Select Role**, **Organization name**, and/or **Status**
- 4) Click the **Search** button

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User ID: C15581
User Role: Grantee
Organization: LOUISVILLE - JEFFERSON COUNTY METRO GOVT
[Logout](#)

Admin
[Search User Profiles](#)
[Table Maintenance](#)

Utilities
[Home](#)
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Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

Projects/Activities **Funding/Drawdown** **Grant** **Grantee/PJ** **Admin** **Reports**

User Profile

Search User Profiles

Search Criteria

User ID: **First Name:** **Last Name:**

(ex: xxxxxxx)

Select Role: **Organization name:** **Status:**

All Select Status

- 5) Search results page will appear
- 6) Click **View** under **Action** column

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT IDIS version 11.0.1_3381

Community Development Systems

Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Headquarters
Organization: Headquarters
[Logout](#)

Projects/Activities **Funding/Drawdown** **Grant** **Grantee/PJ** **Admin** **Reports**

User Profile

Search User Profiles

Search Criteria

User ID:
(ex: xxxxxxxx)

First Name:
Last Name:

Select Role:
Organization name:
Status:

Results Page 1 of 1

User ID	First Name	Last Name	Status	Action
C15581	TONY	PULLIAM	Active	Edit View

Admin
[Add User Profile](#)
[Search User Profiles](#)
[HOME Match Liability Rate](#)
[Table Maintenance](#)

Utilities
[Home](#)
[Data Downloads](#)
[Print Page](#)
[Help](#)

Links
[PDF Viewer](#)
[Support](#)
[CPD Home](#)
[HUD Home](#)

- 7) **View User Profile** page will appear

Integrated Disbursement & Information System (IDIS)

User ID: C32177
User Role: Headquarters
Organization: Headquarters
[Logout](#)

Projects/Activities **Funding/Drawdown** **Grant** **Grantee/PJ** **Admin** **Reports**

User Profile

View User Profile (Page 1)

User ID: C15581
Status: Active
Status Modified Date: 01/30/2009

Existing User Roles:
[Headquarters](#)
[Field Office](#)
[Grantee](#)

User Information

First Name: TONY
Middle Initial:
Last Name: PULLIAM
Email: tony.pulliam@psi.com

Department:
Supervisor's ID:
Phone #:
Ext:
Fax:

Admin
[Add User Profile](#)
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10. Logging Out of IDIS OnLine

- 1) Once the user has logged into IDIS OnLine, the user can log out anytime by clicking the **Logout** button on the top left portion of page:

The screenshot shows the IDIS OnLine home page. At the top, it says "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this is a blue header with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)". On the left, there is a sidebar with user information: "User ID: C32177", "User Role: Grantee", "Organization: BOSTON", and a "Logout" link. To the right of the sidebar, there is a navigation bar with links: "Projects/Activities", "Funding/Drawdown", "Grant", "Grantee/PJ", "Admin", and "Reports". The main content area has a "Welcome to the Integrated Disbursement and Information System" message. Below this, there is a "IDIS News" section with "No news to display." and a "Warning!" section with text about misuse of federal information and session expiration. At the bottom, there is contact information for the U.S. Department of Housing and Urban Development.

- 2) IDIS OnLine Logout page will appear

The screenshot shows the IDIS OnLine Logout page. At the top, it says "U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT" and "IDIS version 11.0.1_3381". Below this is a blue header with "Community Development Systems" and "Integrated Disbursement & Information System (IDIS)". On the left, there is a sidebar with links: "PDF Viewer", "Support", "CPD Home", and "HUD Home". The main content area has a message: "You are not logged in to IDIS". Below this, there is a bullet point: "• You have been logged out from IDIS and your session has been cleared." and a paragraph: "The IDIS login page will be displayed shortly, or click [here](#) if the page does not refresh."